From:	Rellen Hayes
To:	Tucker-Potter, Stacy
Subject:	Data Docs
Date:	Tuesday, August 20, 2019 1:34:14 PM
Attachments:	DataDocs_DueBacktoPCI.doc PCI Occupation Codes.xlsx Sample Survey Questions.doc

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Hi Stacy,

Hope your day is off to a great start. Will you be able to send over the completed Data Docs by end of tomorrow (8/21)?

For your quick reference,

- **Data Documents:**
  All data documents are in the attachment 'Data Docs Due Back to PCI'
  - **Step 1:** Complete the '**Standard Data Fields for Collection and Printing**' (p. 1-5 in attachment 'DataDocs_DueBacktoPCI)
    - Did you select that you would like to use PCI's Occupation Codes or are you unsure if you would prefer to use yours or ours?
      - Attached is 'PCI Occupation Codes'
    - Are you debating on having PCI ask additional survey questions during the update call?
      - Attached is the 'Sample Survey Questions'
  - **Step 2:** Populate your complete data file based upon selected fields in the document completed during Step 1. Feel free to flag your VIPs (Board of Trustees and top exclusive donors) so they receive a softer outreach touch. Also, remember to include any "Do Not Contact" flags, "Deceased" flags and "Lost Alumni" flags.
  - **Step 3:** Run some queries on your data file prior to sending to PCI.
    - Complete the '**Record Count Sheet'** on p. 6 in attachment 'DataDocs_DueBacktoPCI'
  - **Step 4:** How would you prefer data is formatted when sent back to you from PCI?
    - Complete the '**Data Entry Specifications'** document on p. 7 in attachment 'DataDocs_DueBacktoPCI'
  - **Step 5:** How often and in what format would you like your data returns?
    Complete the '**Data Return Scheduling and Specifications'** document on p. 8-9 in attachment 'DataDocs_DueBacktoPCI'

Thanks!

Rellen

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Back-to-Back Winner! For two years in a row PCI has been named the "#1 Best Place to Work" in the state of Texas (The Texas Association of Business and the publishers of *Texas Monthly*) and in Dallas-Fort Worth (*Dallas Morning News*). Research shows that a highly engaged workforce drives higher overall client satisfaction.

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